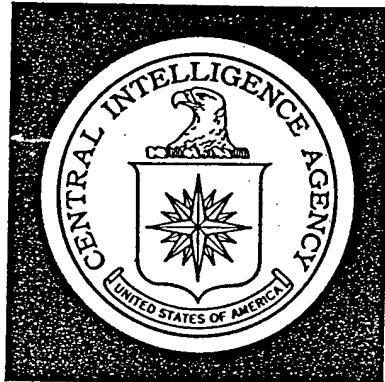


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DIRECTORATE OF
INTELLIGENCE

Intelligence Memorandum

Shipping to Cuba in the Third Quarter of 1968

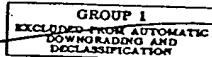
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ER IM 68-160
December 1968

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WARNING

This document contains classified information affecting the national security of the United States within the meaning of the espionage laws, US Code Title 18, Sections 793, 794 and 798.



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Foreword

This is one of a series of reports published since 1962 which are designed to analyze the number and flags of merchant ships arriving in Cuban ports and the level and composition of imports and exports. The statistics are obtained by aggregating data on individual voyages.

All ship tonnages reported are expressed as gross register tons (GRT), which is a measure of the cubic space of a ship expressed in tons at the rate of 1 gross register ton per 100 cubic feet. The GRT figures assigned to the shipping discussed are taken from *Lloyd's Register of Shipping*. If a ship calls at several Cuban ports, it is counted as one arrival. The volume of cargo is expressed in metric tons. Dry cargo data include that carried on passenger ships as well as on dry cargo ships. Yugoslav shipping is included in Free World shipping. Data for 1968 are preliminary. Because of rounding, components may not add to the totals shown.

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CENTRAL INTELLIGENCE AGENCY
Directorate of Intelligence
December 1968

INTELLIGENCE MEMORANDUM

Shipping to Cuba in the Third Quarter of 1968

Summary

The main features of shipping to Cuba in the third quarter of 1968 were a sharp increase in imports of petroleum, a marked drop in exports of sugar, and a continued absence of Soviet military equipment deliveries. There have been no major Soviet military deliveries to Cuba for a ten-month period (since mid-February 1968). This is the longest period without a military delivery since at least 1961.

Cuba's total seaborne foreign trade was down 4 percent in the third quarter of 1968 compared with the same quarter in 1967. A 9-percent increase in imports was more than offset by a 23-percent decrease in exports, as shown in the following tabulation:

Note: This memorandum was produced by CIA. It was prepared by the Office of Economic Research and was coordinated with the Office of Strategic Research. Aside from the coordination of numbers of ship arrivals

, this memorandum has not been coordinated outside of CIA.

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July-September

	1967		1968		
	Thousand Tons	Percent	Thousand Tons	Percent	Percentage Change
<i>Volume of seaborne trade</i>	<u>3,807</u>		<u>3,668</u>		-4
Imports	<u>2,256</u>	<u>100</u>	<u>2,467</u>	<u>100</u>	+9
From Com- munist countries	1,921	85	2,143	87	+12
From Free World countries	336	15	324	13	-4
Exports	<u>1,551</u>	<u>100</u>	<u>1,201</u>	<u>100</u>	-23
To Com- munist countries	930	60	607	51	-35
To Free World countries	621	40	594	49	-4

The increase in imports stemmed largely from a 26-percent rise in Soviet deliveries of crude oil (up 201,000 tons) and a 46-percent rise in petroleum products (up 136,000 tons). These increases compensated for the low volume imported during the second quarter of 1968 and brought deliveries of petroleum in the first nine months to a level only 5 percent above that of the corresponding period in 1967. There also were increases in imports of chemicals and fertilizer in the third quarter and significant decreases in imports of foodstuffs, metal products, and general cargo. Substantial increases in exports of molasses and ores were overshadowed by the 410,000-ton decline in total shipments of sugar, the result of a poor sugar crop. Sugar exports to the USSR dropped nearly 437,000 tons and those to the Free World by 59,000 tons. These declines were only partly offset by higher deliveries of sugar to other Communist countries.

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As fewer ships entered Cuban sugar ports, the total number of ship arrivals declined to 232, the lowest quarterly total since the fourth quarter of 1966. Soviet and Eastern European ship arrivals accounted for all of the decline, Cuban arrivals increased from 25 to 28, and Free World arrivals were about the same as in the third quarter of 1967. Ships from Cyprus (17) and the United Kingdom (18) accounted for more than 60 percent of the 56 Free World arrivals.

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Ship Arrivals

1. There were 232 ship arrivals in Cuba in the third quarter of 1968, a slight decline from the 248 arrivals in the corresponding quarter of 1967 (see Table 1). Gross register tonnage, however, increased slightly. Soviet and Eastern European ships accounted for the decline in number of arrivals, as shown in the following tabulation:

Flag	July-September		Percentage Change
	1967	1968	
Total	248	232	-6
Soviet	139	130	-6
Eastern Europe	29	18	-38
Cuban	25	28	+12
Free World	55	56	+2

2. The 130 Soviet arrivals in the third quarter were significantly below the record level of 166 arrivals in each of the previous two quarters. The number of dry cargo arrivals (70) was the lowest in the past two years (see Figure 1). The 57 tanker arrivals were significantly above the 41 arrivals in the corresponding quarter of 1967, however, and approached the record level of 61 arrivals in the second quarter of 1967. Soviet ships delivered 81 percent of Cuba's imports in the third quarter, including all of the crude oil and 97 percent of the petroleum products. Eastern European arrivals, which carried only 2 percent of total imports, were at the lowest quarterly level in two years. Ships flying the Cuban flag delivered 5 percent of total imports.

3. The 56 Free World arrivals in the third quarter delivered 12 percent of total imports. Calls by tankers (mostly to load molasses) increased, while calls by dry cargo ships declined. Although the flags of 11 Free World countries appeared at Cuban ports, the United Kingdom and Cyprus accounted for more than 60 percent of Free World arrivals, as shown in the following tabulation:

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Flag	<u>July-September</u>	
	1967	1968
Cyprus	14	17
Greece	5	2
Lebanon	5	2
United Kingdom	11	18
Other	20	17
<i>Total</i>	55	56

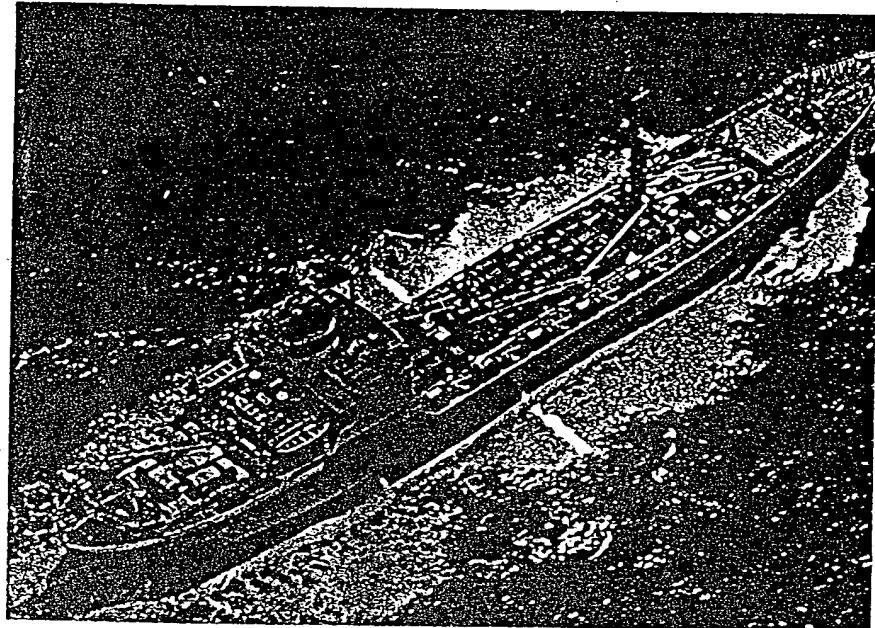


Figure 1. The Soviet Ship *Krasnoye Selo* (9,2 GRT) En Route to Cuba on 29 July 1968 with a Cargo of Vehicles

4. Ten of the Free World ships (six Cypriot, two Greek, one Lebanese, and one Somalian) were owned or controlled by Greek shipping magnate Achilles Frangistas. Four of these ships delivered cargoes from the USSR, and six discharged cargoes (primarily fertilizer) loaded at Free World ports. The increase in Cypriot-flag arrivals and the decline in Greek and Lebanese-flag arrivals is the

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result of the transfer of Frangistas' ships during the past year from Greek and Lebanese registry to Cypriot and Somalian registry.

Cargoes

5. The volume of seaborne trade handled at Cuban ports in the third quarter of 1968 declined 4 percent below the level of the corresponding quarter of 1967 (see Figure 2 and Tables 2-6, 8, and 9). A 23-percent decline in exports -- principally in sugar exports to the USSR -- more than offset a 9-percent increase in imports, as shown in the following tabulation:

	July-September (Thousand Tons)		Percentage Change
	1967	1968	
Volume of trade	3,807	3,668	-4
Imports (by carrier)	2,256	2,467	+9
Soviet	1,744	2,001	+15
Eastern European	85	45	-47
Cuban	108	136	+26
Free World	320	286	-11
Exports (by carrier)	1,551	1,201	-23
Soviet	771	526	-32
Eastern European	195	107	-45
Cuban	168	122	-27
Free World	416	445	+7

6. Imports of crude oil increased 26 percent to a total of 986,000 tons, and imports of petroleum products jumped 46 percent to a total of 434,000 tons, the second highest quarterly total on record (see Table 7). These increases more than made up for declines in deliveries earlier in the year. For the first nine months of 1968, crude oil imports were 7 percent higher than in the same period in 1967, and imports of petroleum products were about the same.

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7. There have been no Soviet military deliveries to Cuba since mid-February 1968. This ten-month gap (through 15 December 1968) in military deliveries to Cuba is the longest since at least 1961. The longest previous gaps were seven months (from December 1964 to July 1965) and six and one-half months (from October 1965 to May 1966). The current lapse follows a 17-month period of military deliveries that ran from mid-September 1966 to mid-February 1968. Some resupply of ammunition and replacement parts, and possibly a new cycle of military equipment deliveries, can be expected in the near future.

8. Communist countries were the source of 87 percent of Cuba's imports in the third quarter of 1968 -- 80 percent from the USSR, 4 percent from Communist China, 2 percent from Eastern Europe, and less than 1 percent from North Korea. Imports from Communist China were higher than for any quarter during the past three years. The 73,000 tons of rice imported from China was at least twice the level of any quarter since mid-1966 and almost three times that of the second quarter of 1968 (see Figure 3).

9. Thirteen percent of Cuba's imports in the third quarter originated in Free World countries, the lowest share for any quarter in the last three years. More than one-third of these cargoes were foodstuffs -- wheat and flour from Canada purchased on Soviet account, and corn from Mexico, all carried on Soviet ships. Fertilizer accounted for another one-third of imports from the Free World. Other cargoes included chemicals from Italy and Japan and pharmaceuticals from the Netherlands.

10. Exports in the third quarter declined 23 percent because of a 30-percent decrease in exports of sugar, the result of a poor sugar crop (see Figure 4 and Table 9). A precipitous drop in exports to the USSR overshadowed other changes in sugar deliveries in the quarter, as shown in the following tabulation:

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FIGURE 2

Cuban Imports Carried by Soviet-Eastern European,
Cuban, and Free World Shipping

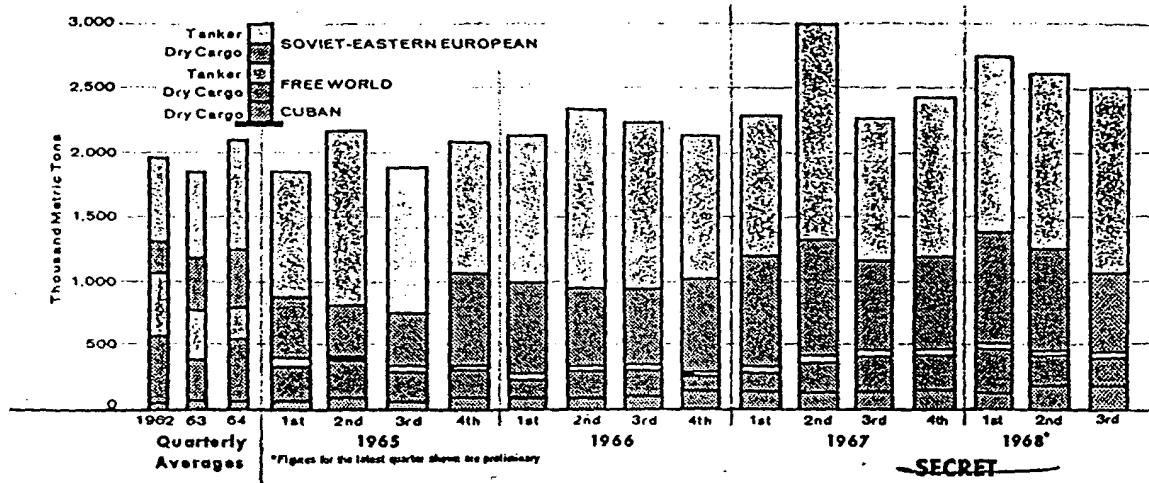
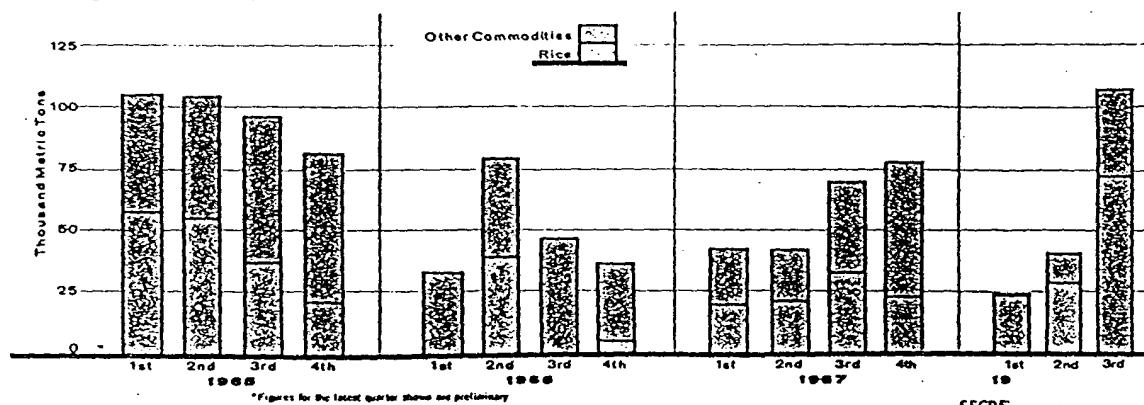


FIGURE 3

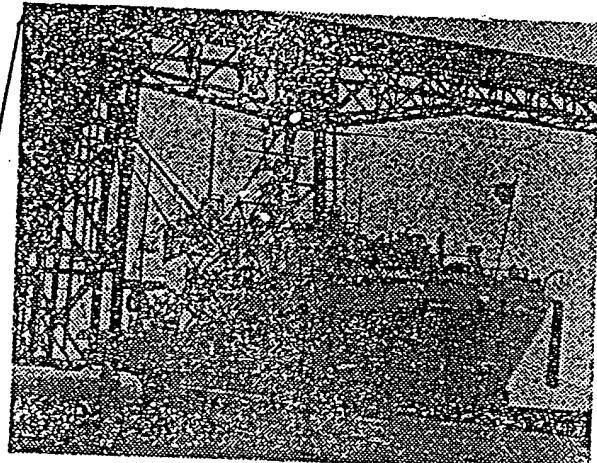
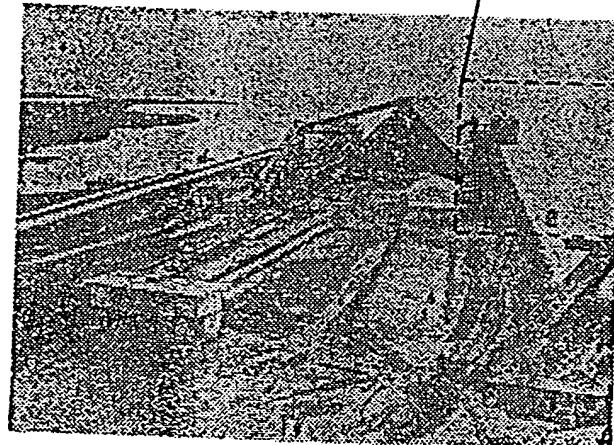
Cuban Imports From Communist China
By Quarter
First Quarter 1966 - Third Quarter 1968*



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	July-September (Thousand Tons)		Percentage Change
	1967	1968	
Communist countries	<u>870</u>	<u>518</u>	-40
USSR	663	227	-66
Communist China	97	116	+20
Other	110	175	+59
Free World countries	<u>506</u>	<u>447</u>	-12
Total	1,376	966	-30

Figure 4. Sugar-Loading Facilities at Guayabal, Cuba, and the Probable Soviet Shin Novokuybyshevsk (9,120 GRT) Loading 12,000 Tons of Sugar for Japan



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11. For the first nine months of 1968, exports of sugar were down 18 percent; Free World and Communist countries shared proportionately in the decline. Sugar exports to the USSR, however, were down 25 percent (500,000 tons). Japan continued to be the largest Free World purchaser of Cuban sugar followed by Spain, the United Arab Republic, and Algeria. The United Kingdom and Bulgaria were the largest purchasers of Cuban molasses, and Poland received almost half of Cuba's ore exports. Exports of molasses and ores were significantly higher than in the third quarter of 1967. For the first nine months of 1968, the volume of total exports was 13 percent below the first nine months of 1967.

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Table 1

Numbers and Tonnage of Ships Arriving in Cuba, by Flag of Ship
July-September 1967 and July-September 1968

Type	Arrivals						Thousands Gross Register Tons			
	1967		1968		1967		1968		1967	
	Jul	Sep	Jul	Sep	Jul-Sep	Jul	Aug	Sep	Jul-Sep	
Total passenger	8	1	2	1	4	27.4	11.0	29.8	4.2	45.7
Soviet	7	1	1	1	3	45.4	11.0	17.9	4.9	33.8
Eastern European	1				1	11.9	11.9	11.9	11.9	11.9
Total dry cargo	192	26	23	21	160	1,467.2	439.6	389.8	414.2	1,243.7
Communist a/	116	32	26	28	86	985.6	290.3	219.7	254.9	764.9
Soviet	91	26	20	24	70	834.1	249.8	183.9	221.2	654.9
Eastern European	25	6	6	4	16	151.5	40.5	35.8	33.7	110.0
Cuban	25	11	8	9	28	119.6	50.5	43.6	50.0	144.1
Free World	51	13	19	14	46	362.1	98.8	126.5	109.3	334.7
Total tanker	48	25	20	23	68	895.7	376.0	362.9	440.7	1,179.6
Soviet	41	19	19	19	57	816.9	308.8	351.2	399.2	1,059.2
Eastern European	3	1			1	36.3	11.7			11.7
Free World	4	5	1	4	10	42.6	55.5	11.7	41.5	108.6
Total all types	248	82	75	75	232	2,420.3	826.6	782.6	852.8	2,469.0
Total Communist a/	168	53	47	48	148	1,896.1	621.8	600.7	652.0	1,881.6
Soviet	139	46	40	44	130	1,696.4	569.6	553.0	625.3	1,747.9
Eastern European	29	7	7	4	18	199.7	52.3	47.7	33.7	133.7
Total Cuban	25	11	8	9	28	119.6	50.5	43.6	50.0	144.1
Total Free World	25	18	20	18	26	404.6	154.3	138.2	150.8	443.3

a. Excluding Cuba.

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Table 2
Cuban Imports Carried, by Type of Ship
July-September 1967 and July-September 1968

Type	1967			1968			Thous and Metric Tons
	Jul-Sep	Jul	Aug	Sep	Jul-Sep		
Total passenger	4.9	0	3.5	0.1	3.6		
Soviet	1.9		0.6	0.1			
Eastern European	3.0		2.8				0.8
Total dry cargo	1,153.1	377.4	306.7	333.6	1,017.7		2.8
Communist a/	758.6	236.2	172.3	202.0	610.5		
Soviet	692.8	225.7	156.3	186.4	568.4		
Eastern European	65.8	10.5	16.0	15.6	42.1		
Cuban	107.6	48.7	36.8	50.0	135.6		
Free World	287.0	92.5	97.6	81.5	271.6		
Total tanker	1,098.0	473.8	462.2	509.6	1,445.6		
Soviet	1,049.7	460.8	462.2	508.8	1,431.7		
Eastern European	15.7						
Free World	32.6	13.0		0.9			
Total all types	2,256.0	851.2	772.3	843.3	2,466.9		
Total Communist a/	1,828.8	697.0	637.9	710.9	2,045.8		
Soviet	1,744.3	686.5	619.1	695.3	2,000.9		
Eastern European	84.5	10.5	18.8	15.6	44.9		
Total Cuban	107.6	48.7	36.8	50.0	135.6		
Total Free World	319.6	105.5	97.6	82.4	285.5		

a. Excluding Cuba.

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Table 3

Free World and Eastern European Ship Arrivals in Cuba, by Flag and Type
 July-September 1967 and July-September 1968

Flag	Jul-Sep 1967		Dry Cargo		Tanker		Total	
	Arrivals	Gross Register Tons	Arrivals	Gross Register Tons	Arrivals	Gross Register Tons	Arrivals	Gross Register Tons
Cyprus	14	98.8	13	100.5	4	45.6	17	146.0
Finland	5	31.8	3	17.5			3	17.5
France	5	18.1	2	7.7			2	7.7
Greece	5	39.4	2	14.4			2	14.4
Italy	4	42.4	2	13.0	1	11.0	3	24.0
Lebanon	5	40.3	2	13.7			2	13.7
Malta	1	5.3	3	21.8			3	21.8
Monaco					1	14.7	1	14.7
Somali Republic	1	7.2	2	14.4			2	14.4
United Kingdom	11	89.7	14	118.1	4	37.3	18	155.5
Yugoslavia	4	31.6	3	13.5			3	13.5
Total Free World	25	404.6	46	334.7	10	108.6	56	443.3
Bulgaria	8	74.8	1	6.1				
Czechoslovakia	6	25.5	4	18.0	1	11.7	2	17.9
East Germany	12	89.5	10	91.0			4	18.0
Poland	3		2	6.8			10	91.0
Total Eastern European	22	122.7	17	122.0	1	11.7	18	133.7

a. Including one passenger ship.

Table 4

Cuban Imports, by Commodity and Flag of Carrier a/
July-September 1968

Commodity	Thousands Metric Tons				
	Soviet	Eastern European	Cuban	Free World	Total
Crude oil	986.1	Neql.	0.1	13.5	986.1
Petroleum products	420.5	5.5	72.3	62.9	434.1
Cereals and foodstuffs	197.0 b/	0.4	7.0	4.6	337.6
Metal products	32.6	7.3	27.3	124.7	44.7
Fertilizer	122.1	Neql.	4.8	20.2	281.4
Wood products	54.7	6.8	1.0	4.1	79.7
Jute bags	6.8				6.8
Chemicals	27.3				48.7
Ammonia	4.7				4.7
Cement	25.7				46.3
General cargo (including vehicles, industrial machinery, and unidentified cargo)	123.3	29.8	19.9	23.7	196.7
Total	2000.2	44.9	135.6	285.5	2,466.9

- a. In some instances, cargo tonnages are estimated on the basis of trends in utilization of cargo capacity in known shipments to Cuba.
 b. Including 21,014 tons of foodstuffs carried by tankers and excluding 6,981 tons of foodstuffs by five Soviet ships attached to the fishing fleet.

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Table 5
 Cuban Imports Carried by Free World Ships, by Flag and Type
 July-September 1968

Flag	Dry Cargo	Tanker	Metric Tons	
			Thousands	Total
Cyprus	109.7	0.9		110.6
Finland	22.2			22.2
France	3.7			3.7
Greece	20.2			20.2
Italy	2.6	13.0		15.6
Lebanon	18.0			18.0
Malta	27.4			27.4
Somali Republic	20.0			20.0
United Kingdom	33.6			33.6
Yugoslavia	14.2			14.2
Total Free World	<u>271.6</u>	<u>13.9</u>		<u>285.5</u>

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Table 6

Cuban Imports Carried by Soviet Ships, by Commodity
July-September 1965-68

Commodity	July-September (Thousands Metric Tons)			Percentage Change July-September 1968 over July-September 1967
	1965	1966	1967	
Crude oil	901.2	926.6	785.5	986.1 +25.5
Petroleum products	182.1	353.8	249.9	420.5 +68.3
Cereals and foodstuffs	116.4 a/	209.9 b/	239.8 c/	197.0 d/ -17.8
Metal products	33.4	45.0	65.1	32.6 -49.9
Fertilizer	69.6	124.2	136.4	122.1 -10.5
Wood products	72.1	69.0	59.2	54.7 -7.6
Jute bags		7.2	19.1	6.8 -64.4
Chemicals	31.4	25.3	33.8	27.3 -19.2
Ammonia	1.7	2.2	4.6	4.7 +2.2
Cement	12.0	22.8	27.5	25.7 -6.5
vehicles, industrial machinery, and unidentified cargo)	79.5	74.1	113.4	123.3 +8.7
Total	1,508.4	1,865.6	1,744.3	2,000.9 +14.7

- a. Including 9,980 tons of foodstuffs carried by tanker.
 b. Including 10,637 tons of foodstuffs carried by tanker.
 c. Including 10,617 tons of foodstuffs carried by tanker.
 d. Including 21,014 tons of foodstuffs carried by tanker.

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Table 7
Cuban Imports, by Commodity
July-September 1967 and 1968 and January-September 1967 and 1968

Commodity	Thousands Metric Tons						Percentage Change (Jul-Sep 1968 over Jul-Sep 1967)		Percentage Change (Jan-Sep 1968 over Jan-Sep 1967)	
	1967			1968			Jul-Sep 1967	1968	Jan-Sep 1968	Jan-Sep 1967
	Jul	Aug	Sep	Jul	Sep	Jul-Sep				
Crude oil	785.5	351.9	308.0	326.2	986.1	+25.5	2,860.0	3,049.4	+6.6	+1.2
Petroleum products	298.2	110.2	143.5	180.5	434.1	+45.6	1,081.6	1,094.6	+1.2	+5.5
Cereals and foodstuffs	392.9	2/ 134.0	101.2	102.4	337.6	-14.1	1,056.4	1,114.2	+5.5	+9.9
Metal products	77.3	2.4	12.2	30.1	44.7	-42.2	218.6	196.9	+3.9	-10.2
Fertiliser	253.9	145.7	71.2	64.5	281.4	+10.8	991.9	1,031.0	+4.0	+3.9
Wood products	89.8	12.0	39.3	28.4	79.7	-11.2	241.0	216.5	+10.2	-10.2
Jute bags	19.1	1.6	4.0	1.2	6.8	-64.4	36.9	17.4	-52.8	+16.6
Chemicals	39.0	9.7	24.3	14.7	48.7	+24.9	134.6	157.0	+16.6	+10.2
Ammonia	4.6	1.8	0.6	2.4	4.7	+2.2	11.8	13.0	-11.6	-11.6
Cement	51.0	24.8	11.7	9.8	46.3	-9.2	273.9	242.0	+10.2	-11.6
Vegetables, industrial machinery, and unidentified cargo)	234.6	57.2	56.5	82.9	196.7	-16.2	617.3	687.8	+11.4	+3.6
Total	2,256.0	821.2	772.3	843.2	2,466.9	+9.3	7,554.4	7,826.0	+3.6	

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machinery, and unidentified cargo)

Total
2,256.0
821.2
772.3
843.2
2,466.9
+9.3
7,554.4
7,826.0
+3.6

- a. Including 10,617 tons of foodstuffs carried by tankers and excluding 733 tons carried by 1 Soviet ship attached to the fishing fleet.
- b. Including 10,621 tons of foodstuffs carried by tankers and excluding 5,317 tons carried by 2 Soviet ships attached to the fishing fleet.
- c. Including 10,393 tons of foodstuffs carried by tankers and excluding 480 tons carried by 1 Soviet ship attached to the fishing fleet.
- d. Excluding 1,119 tons of foodstuffs carried by 2 Soviet ships attached to the fishing fleet.

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Table 8

Cu'-an Imports, by Country of Origin
July-September 1968

Origin	Thousand Metric Tons			Percent
	Jul	Aug	Sep	
Free World	<u>138.6</u>	<u>98.3</u>	<u>86.8</u>	<u>323.7</u>
	<u>712.6</u>	<u>674.0</u>	<u>756.5</u>	<u>2,143.1</u>
USSR	653.9	628.9	690.4	1,973.1
Eastern Europe	13.8	24.6	11.8	50.2
Communist China	45.1	10.9	54.4	110.3
North Korea		9.5		9.5
Total	<u>851.2</u>	<u>772.3</u>	<u>843.3</u>	<u>2,466.9</u>
				<u>100.0</u>

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Table 9
Cuban Exports, by Destination
July-September 1967 and July-September 1968

Destination	July-September						Total 1968	
	Sugar		Molasses		Ores			
	1967	1968	1967	1968	1967	1968		
Free World	205.9	447.4	105.5	123.4	2.5	2.2	13.5	
Algeria	18.8	30.0	0.6	16.0	..	0.8	..	
Belgium	10.5	10.5	..	..	1.1	..	..
Canada	2.6	..	15.8	..	..	..	..
Canary Islands	..	..	9.5	..	..	..	..
Ceylon	28.1	20.9	..	..	..	..	..
Finland	..	12.6	..	..	..	..	..
France	..	22.0	..	..	..	..	..
Greece	..	11.7	..	..	..	..	..
Hong Kong	..	..	..	..	..	..	..
Ireland	..	..	..	..	..	..	..
Italy	..	..	..	..	..	..	..
Japan	170.8	185.6	16.3	..	..	..	..
Lebanon	2.9	..	..	..	..	..	..
Malta	..	..	..	..	..	..	..
Malaysia	46.5	..	2.1	..	..	..	..
Mexico	..	..	..	..	..	..	..
Morocco	..	..	..	..	..	..	..
Netherlands	24.5	21.3	..	..	1.8	..	..
Norway	16.0	8.5	..	..	..	..	..
Saudi Arabia	17.6	..	..	..	4.0	..	..
Spain	
Sweden	90.3	41.0	
Switzerland	10.7	
Syria	9.6	
United Arab Republic	29.7	30.2	

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Table 9
Cuban Exports, by Destination
July-September 1967 and July-September 1968
(Continued)

Destination	July-September						Thousands Metric Tons	
	Sugar		Molasses		Ores			
	1967	1968	1967	1968	1967	1968		
Free World (Continued)								
United Kingdom	..	..	53.2	94.6	..	..	53.2
West Germany	15.6	25.2	20.0	11.2	..	..	20.0
Yugoslavia	11.9	..	..	..	..	..	12.3
Zambia	..	..	..	..	..	..	25.8
Communist countries	870.2	218.2	39.5	68.8	15.3	32.4	..	
Bulgaria	19.4	29.6	4.9	33.8	0.1	..	0.6	
Communist China	96.7	116.2	..	..	1.0	0.4	24.4
Czechoslovakia	6.0	4.9	19.1	..	..	6.2	97.7
East Germany	63.7	79.8	..	..	1.8	0.7	25.7
Hungary	..	..	..	..	..	3.3	13.3
North Korea	..	18.2	..	15.0	..	0.2	..	
North Vietnam	..	11.4	..	..	..	..	33.4
Poland	20.9	31.5	..	..	1.5	18.0	..
Romania	663.4	226.6	10.5	5.0	..	..	23.0
USSR	..	..	..	..	11.0	6.8	10.5
Total	<u>1,376.1</u>	<u>965.6</u>	<u>144.9</u>	<u>172.2</u>	<u>20.8</u>	<u>41.7</u>	<u>21.2</u>	
							<u>1,550.6</u>	
							<u>1,200.5</u>	

b. Including foodstuffs (meat, honey, fruits, and vegetables), tobacco and cigarettes, rum, alcohol, and unidentified cargoes.

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